ACS Technologies

Membership PLUS

Before You Begin

Background and Planning

It is very important that you take the time to study the module definitions and concepts presented in this guide. Understanding what Membership PLUS means when various terms are presented will give you a head start and allow you to make progress right away when you start using the program. Thinking about your church or organization’s needs and planning will enhance your efficiency and the accuracy of your data.

Analyzing Your Organization and Gathering Data

Membership PLUS can manage a virtually unlimited amount of data about your members. Before you get started using the program, it would be to your advantage to think about the types of information that your organization currently tracks or would like to track.

Do you want to keep track of information about individual members and their families, individuals only, or families only? That decision affects the other data you will want to collect and have available when you sit down with Membership PLUS. If you only track families, for example, the marital status or birthdays of individuals aren’t relevant to your needs but if you track individuals, those details may be necessary as part of the basic information that should be entered for everyone.

Unless your organization is just getting off the ground, you already have some sort of system in place for tracking information about your members. Whether it’s another software program or a paper-based system, you can use it as a starting point for deciding what data you want to enter into Membership PLUS.

Getting Started Tips:

1. Review your current system and make a list of every piece of information you’re tracking. Be sure to identify those items for which there are no “organized” ways to monitor the data
2. Analyze each item and decide if it’s something you want to continue maintaining.
3. Finally, add to the list the information that your organization wants to start tracking. This could be information for which there was not a good place to record the data in your previous software, or items that are new to your membership. For example, if your church or group only recently set up an Internet email account, you may want to start gathering email addresses from your members so that you can communicate with them via email instead of regular mail.

Starting to use a new program like Membership PLUS provides a good opportunity to update records for all of your members. You need an organized procedure to collect up-to-date information from all your members so that you can enter it into the program.

One way to do this is to create a fill-in-the-blank member information form. The form should include space for each individual or family to record the information your organization wants to track. Distribute copies of the form to all your members and use them as the basis for entering initial information into the program.

Provide the form, or a modified version of it, to new members as they join your organization. You may want to redistribute the form to your entire membership periodically to gain updated information and keep your database current. (In fact, this is a good idea even if you've been using previous versions of Membership PLUS for years.)

Membership PLUS provides two simple example forms you can use as a starting point for designing your own form or use the forms as provided. Form 1 is for families and Form 2 is for individuals. Enter a requested return date and the name of the person who will be responsible for collecting the forms in the spaces provided. Make copies and distribute a form to every member in your church or organization.

The forms are located at www.memplushome.com/gettingstarted.

Entering Data

There are two strategies for manually entering your member information: doing it all at once, or doing it as you need it.

Entering data all at once (Using most features of Membership PLUS)

If you plan to use all or most of the features of Membership PLUS (reports, mailing labels, contribution tracking, and recording attendance), it is recommended to spend the necessary time entering all of your basic member information first.

Take the time to set up basic financial information, too. You'll need information about the banks your church uses, information about the accounts, categories, and/or classes used in your financial accounting system. Work with the person who does the accounting for your organization to set up this information in Membership PLUS.

Once all the relevant data has been entered into the program, you can focus on the details of contribution data entry, attendance tracking or reporting.

Entering data as you need it (Using Contributions primarily)

If your primary use for Membership PLUS is to track contributions, create new members as needed to enter their contributions.

When you get a check from someone who is not already in the data set, simply add that individual or family using the name, address, and phone information from his or her check. If you receive a cash contribution, you will need to retrieve the information from the individual if it is not provided with the contribution.

This approach may increase the time it takes to record the first few weeks' worth of contributions, but it may save some time in the end since you don't have to enter any information for anyone who is not a contributor. After a few weeks you can fill in the rest of the information about each contributor's family, alternate addresses, employers, and so on. This allows you to get started immediately with Membership PLUS without a lengthy data entry period.

You can use this same approach to define new funds. As you receive a contribution for a fund that is not yet in the data set, simply add the fund. Once you've saved the new fund record, you can proceed to enter the contribution.

Practicing with Sample Data

Membership PLUS can keep track of a lot of information that is important to the effective operations of your church or organization. Much of the data is sensitive data—phone numbers, social security numbers, contribution data, etc. It's important that all the data be entered correctly and as efficiently as possible. The background information you've gained and the planning you've done as a result of reading this manual will go a long way toward helping you make effective use of the features of Membership PLUS from the very beginning.

Membership PLUS provides sample data that you can use to view the program's features and functions. You can see examples of member, group, and financial data and generate sample reports to see what you can do with each piece of information. In addition you'll see examples of the kinds of "user-defined" fields and data that can be created and entered to customize the program for a church or other service organization.

If you want to practice entering data without jeopardizing your church or organization's data, you might want to create your own practice data set. Sometimes, using a small subset of your real data can provide a better indicator than the sample data and allow you to gain a better picture of how Membership PLUS can meet your church or organization's specific needs. You'll recognize your organization's members in the reports and you'll know where you entered the data and how it's used. You will see the differences between individual members, individuals linked to families, and "stand-alone" family unit members to decide which type(s) of member records make the most sense to your church or organization. Practice entering pledges and contributions so that you can see what information you need at what point in the data entry process for the most efficient entry. You can do all of this—and more—in a practice data set, gaining confidence in your understanding of the program's features without worrying about "damaging" your real data.